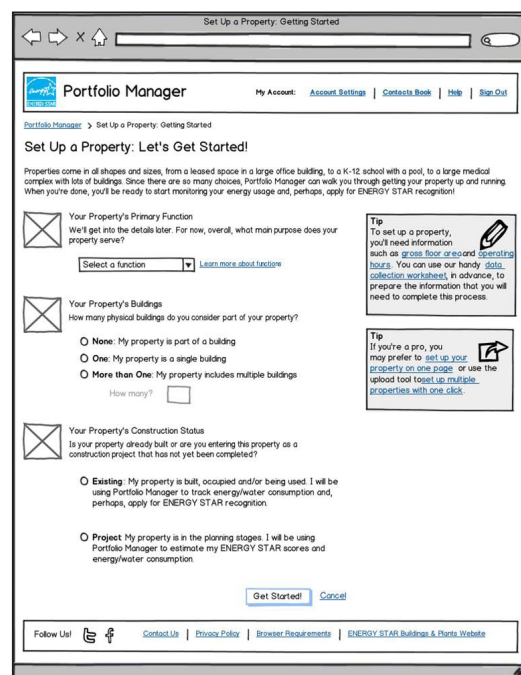


During the spring of 2013, EPA will release a complete upgrade for its popular Portfolio Manager tool. This tool, currently in use by more than 40,000 individual accounts to measure, track, assess, and report on the energy and water performance of more than 250,000 commercial buildings, will get the full treatment: a new interface, streamlined functionality, and improved usability.

What Will be Upgraded?

- 1) Database architecture
- 2) System processing
- 3) Web services (automated benchmarking services, etc.)
- 4) User Interface
 - Simpler, more streamlined functionality
 - Easier-to-generate, graphical reports
 - Improved sharing features

Right: A rough mock-up of the "Set Up a New Property" wizard. New users can answer a series of easy questions to input a new property and get up and running more quickly than ever.



PROJECT TIMELINE

2010	2011	2012	2013
Conduct user interviews	Specify requirements	Design and development	Testing and final development
			Migrate data
			Rollout

What is Portfolio Manager?

Portfolio Manager is EPA's online management and tracking tool for energy and water. By entering building characteristics, operational characteristics, and energy or water usage data, users can:

- Assess whole building energy and water consumption
- Track changes in energy, water, greenhouse gas emissions, and cost over time
- Track green power purchases
- Create custom reports
- Share data with others

Portfolio Manager provides users with a variety of metrics with which to track their building's performance, including but not limited to:

- Energy consumption
- Water consumption
- Greenhouse gas emissions
- ENERGY STAR energy performance score (available for certain building types), which rates a building on a scale of 1-100 relative to its peers. A score of 75 or higher makes a building eligible to earn EPA's ENERGY STAR.

KEY FEATURES

TURBO TAX®-Like Data Input

We're designing the new Portfolio Manager to work more like Turbo Tax software.

Once upgraded, Portfolio Manager will help users create accounts, enter a portfolio of buildings, and start benchmarking those buildings—all without requiring that the user know anything about the process beforehand.

This tool will ask guided questions to help you through the process of benchmarking.

This means that you'll be up and running faster and you'll have fewer problems with your data down the road.

Easier Sharing and Reporting

Want to share some of your building's data with another person, but don't want that person to be able to see everything in your account? Looking to share more than one building at a time? In the new Portfolio Manager, you'll be able to share many buildings at once and specify what information other users can see and modify.

In addition, Portfolio Manager will let you connect to others, through a social network within the tool.

And when you're ready to share your progress with others in your organization—your CEO, supervisor, investors, tenants, or your company's marketing team—you'll benefit from colorful, easier-to-generate reports.

No Loss of Data

In 2013, EPA will spend several months testing and refining the new tool. Once the new tool launches in spring of 2013, we'll migrate all the data for all 40,000 user accounts into the new tool. That means that you'll be able to pick up right where you left off, with no loss of data.

ABS Upgrade

As part of the Portfolio Manager upgrade project, automated benchmarking services will also receive a new underlying architecture and technology set. This will include a move from SOAP- to REST-based services, easier schema definitions, quicker responses, easier integration, and improved user interface.

Quarterly Update Webinars

December 2011:	Overview, scope of work
March 2012:	New organizational structure
June 2012:	User interface & design
September 2012:	Reporting
December 2012:	New features and functionality for 2013
March 2013:	Preparing for launch

To register for an upcoming update webinar, visit www.energystar.gov/PMupgrade

To learn more about the Portfolio Manager upgrade project, visit energystar.gov/PMupgrade

To learn more about the Automated Benchmarking System upgrade, visit energystar.gov/istar/has/

To learn more about Portfolio Manager, visit energystar.gov/benchmark

Above: Portfolio Manager will streamline data entry processes where possible, including meter data, where information can be added and edited on one screen.

ENERGY STAR is a U.S. Environmental Protection Agency (EPA) Program helping businesses and individuals fight climate change through superior energy efficiency. Learn more at energystar.gov.

